

*N- Not exposed to the task*  
*1- Exposed to the task*  
*2- Accomplished task with help*  
*3- Accomplished task to criteria*  
*4- Able to teach task*

## 1. Introduction to Medical Records Assistant

- 1.1 Identify the roles and responsibilities of team members
- 1.2 Identify the educational requirements and certification(s) of medical records team members
- 1.3 Identify opportunities for employment in the medical records field
- 1.4 Identify and list the functions of the professional organization(s) for the occupational area
- 1.5 Identify location of various types of medical records field
- 1.6 Follow a chain of command
- 1.7 Practice professional work habits
- 1.8 Comply with state regulations for occupational area
- 1.9 Locate OSHA poster(s) and MSDS(s) in clinical site
- 1.10 Identify OSHA regulations that pertain to clinical site
- 1.11 Identify biohazard labels
- 1.12 Apply ethical standards to the occupational area
- 1.13 Apply legal standards to the occupational area
- 1.14 Demonstrate confidentiality in the occupational area
- 1.15 Demonstrate various public relations and marketing techniques
- 1.16 Identify, define and use terminology specific to the occupation
- 1.17 Demonstrate effective stress management

- 2.1 Review daily inpatient and outpatient admissions
- 2.2 Check medical record for required information and signatures
- 2.3 Note deficiencies to be completed by physician and correct/incorrect data
- 2.4 Assign unit numbers
- 2.5 Check daily for prior medical record on all inpatient and outpatient admissions
- 2.6 Retrieve prior record and include that record with current record
- 2.7 Maintain master client index by typing on an index card all pertinent admitting information
- 2.8 Update index with additional data
- 2.9 File index cards of client's discharge
- 2.10 Assemble outpatient records into established order for permanent filing, storage and microfilming
- 2.11 File and retrieve medical records upon request from appropriate persons
- 2.12 Maintain client register of admissions
- 2.13 Prepare file folders and relocate files to basement filing area, as necessary

### 3. Clerical Skills and Abilities

- 3.1 Code and file records alphabetically, chronologically and numerically
  - 3.2 Perform statistical calculations using basic mathematic skills
  - 3.3 Perform daily and monthly statistical calculations relative to outpatient records and inpatient arbitration statistics
  - 3.4 Distribute mail within the department and to appropriate physicians
  - 3.5 Type routine forms and records
- Patient Discharge Record Procedures**
- 4.1 Compare discharge record with daily census
  - 4.2 Assemble medical record content into established order
  - 4.3 Assign unit number and discharge date to medical record and indicate readmission status
  - 4.4 Type routine cards
  - 4.5 Perform re-routing of medical records to appropriate physicians for completion
  - 4.6 File discharge reports and medical records
  - 4.7 Retrieve medical records upon request
  - 4.8 Distribute transcribed reports among nursing units according to established procedure